

Group Notes (Patch OR*3.0*455)

Deployment, Installation, Back-Out, and Rollback Guide



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Artifact Rationale

This document describes the Deployment, Installation, Back-out, and Rollback Plan for new products going into the VA Enterprise. The plan includes information about system support, issue tracking, escalation processes, and roles and responsibilities involved in all those activities. Its purpose is to provide clients, stakeholders, and support personnel with a smooth transition to

the new product or software, and should be structured appropriately, to reflect particulars of these procedures at a single or at multiple locations.

Per the Veteran-focused Integrated Process (VIP) Guide, the Deployment, Installation, Back-out, and Rollback Plan is required to be completed prior to Critical Decision Point #2 (CD #2), with the expectation that it will be updated throughout the lifecycle of the project for each build, as needed.

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1 Introduction

This document describes how to deploy and install Group Notes patch OR*3.0*455 and the associated executable file, as well as how to back-out the product and rollback to a previous version.

1.1 Purpose

The purpose of this guide is to provide a single, common document that describes how, when, where, and to whom Group Notes patch OR*3.0*455 and its associated executable will be deployed and installed, as well as how it is to be rolled back, if necessary. The guide also identifies resources, a communications plan, and a rollout schedule. Specific instructions for installation, back-out, and rollback are included in this document.

1.2 Dependencies

The dependencies are:

- OR*3.0*448
- OR*3.0*519
- **VistA System:** Group Notes patch OR*3.0*455 is for installation on a fully patched VistA system. There is also a Graphical User Interface (GUI) component that should be running on a Windows system. The installation of Group Notes patch OR*3.0*455 is required for the future installations of Group Notes.

1.3 Constraints

The CPRS Group Notes application utilizes a client-server architecture.

The server portion of the OR*3.0*455 version is expected to be installed on fully patched, existing VistA platforms. The client portion is implemented as a Windows executable and will be installed on either a shared network drive – commonly referred to as Gold Star folder or on a user's workstation. Group Notes patch OR*3.0*455 utilizes existing, nationally released security controls to control access.

2 Roles and Responsibilities

No single entity is in charge of decision making for deployment, installation, back out and rollback of OR*3.0*455 and the Group Notes executable. If an issue with the software arises that would require a rollback, the site leadership will meet along with input from development, Patient Safety and Health Product Support to initiate a back out and rollback decision of the software along with Information Technology Operations and Services (ITOPS). The following table provides Group Notes project information.

Table 1: Deployment, Installation, Back-out, and Rollback Roles and Responsibilities

ID	Team	Phase / Role	Tasks	Project Phase (See Schedule)
	Site personnel in conjunction with IT support – which may be local or ITOPS.	Deployment	Plan and schedule deployment (including orchestration with vendors)	After national release.
	Site personnel in conjunction with IT support – which may be local or ITOPS.	Deployment	Determine and document the roles and responsibilities of those involved in the deployment.	After national release.
	Site personnel.	Deployment	Test for operational readiness	After national release.
	Site personnel in conjunction with IT support – which may be local or ITOPS. The IT support will need to include person(s) to install the KIDS build as well as the personnel to deploy the GUI – which may be done on each machine, a shared network and/or the Citrix access gateway	Deployment	Execute deployment	After national release.
	Site personnel in conjunction with IT support – which may be local or ITOPS. The IT support will need to include person(s) to install the KIDS build as well as the personnel to deploy the GUI – which may be done on each machine, a shared network and/or the Citrix access gateway	Installation	Plan and schedule installation	After national release.
	N/A – will work under the VistA ATO and security protocols.	Installation	Ensure authority to operate and that certificate authority security documentation is in place	

	N/A – no equipment is being added.	Installation	Validate through facility POC to ensure that IT equipment has been accepted using asset inventory processes	
	N/A – no new functionality is being introduced.	Installations	Coordinate training	
	Facility CIO and IT support – which may be local or ITOPS.	Back-out	Confirm availability of back-out instructions and back-out strategy (what are the criteria that trigger a back-out)	After national release.
	Hardware and System support – no changes. Software support will be the CPRS Development Team during the compliance period. At the end of the compliance period, support will be transitioned to VistA sustainment.	Post Deployment	Hardware, Software and System Support	After national release.

3 Deployment

Group Notes patch OR*3.0*455 and the Group Notes executable will be released nationally and deployed with a 30-day compliance. Group Notes needs to be installed only for users who need the functionality to write similar notes for a group of patients. It does not need to be installed for all users.

There are no site-facing on-line meetings or training planned for this deployment because there are only minimal Group Notes changes:

- GUI updated to match Encounter form of CPRS GUI v31MA
- GUI updated to adhere to 508 requirements

3.1 Timeline

The provisional release is for Group Notes patch OR*3.0*455 and executable release is for Spring of 2022.

3.2 Site Readiness Assessment

This section discusses the locations that will receive the Group Notes patch OR*3.0*455 and Group Notes executable deployment.

3.2.1 Deployment Topology (Targeted Architecture)

The Group Notes application is not required for all users. Sites can decide which of their users will be given the Group Notes application. Group Notes patch OR*3.0*455 will be available for deployment to each VistA instance. That will include local sites as well as regional data processing centers.

The executable and help file may be deployed to a shared network drive, workstations of Group Notes users, or to the Citrix Access Gateway.

The initial deployment will be to Initial Operating Capabilities (IOC) sites for verification of functionality. Once that testing is completed and approval is given for national release, Group Notes patch OR*3.0*455 and its executable will be available for deployment to all VistA systems.

The Production (IOC) Test sites are:

- Atlanta VA Medical Center
- San Juan VA Medical Center

3.2.2 Site Preparation

No special preparation is needed.

3.3 Resources

3.3.1 Facility Specifics

N/A

3.3.2 Hardware

N/A

3.3.3 Software

N/A

3.3.4 Communications

Service Delivery and Engineering (SDE) Field Implementation Services will be sending out an SDE Bulletin prior to the release of Group Notes patch OR*3.0*455 and the Group Notes executable advising sites of the upcoming release.

After the patch and executable are nationally released, individual site personnel or ITOPS personnel that support sites will be able to download the necessary files for installation. There will be an M side patch, a GUI executable, and a help file.

3.3.4.1 Deployment/Installation/Back-Out Checklist

The deployment and installation will be performed by site or ITOPS support personnel following national release.

4 Installation

4.1 Pre-installation and System Requirements

Vista patches OR*3.0*519 and OR*3.0*448 must be installed before OR*3.0*455

4.2 Platform Installation and Preparation

OR*3.0*455 (Vista KIDS Build) should take less than 5 minutes to install.

The time to deploy the GUI will depend on which method the site utilizes for running the executable (network share, Citrix, individual workstation install, etc.).

It is recommended that the installation be done during non-peak hours. If at all possible, the users should not be in Group Notes when the KIDS installation is being performed.

4.3 Download and Extract Files

OR*3.0*455 is being released as one patch from the national patch module and one host file.

Documentation can also be found on the VA Software Documentation Library at:

<http://www.va.gov/vdl/>

The software for this patch is being released using a host file.

The host file is available at the following location:

/srv/vista/patches/SOFTWARE/OR_30_455.KID

Group Notes files

Group Notes files to be downloaded	File Contents	Download Format
OR_30_455.ZIP	<ul style="list-style-type: none">GroupNotes.exe: Group Notes GUI ExecutableCPRSGN.chm: new Group Notes HELP File	Binary
OR_30_455.KID	<ul style="list-style-type: none">Group Notes (Patch OR*3.0*455)	ASCII
GNUM.PDF	<ul style="list-style-type: none">Group Notes/Encounter Collection User Manual	Binary
OR_30_455_IG.PDF	<ul style="list-style-type: none">Group Notes (Patch OR*3.0*455) Deployment, Installation, Backout, and Rollback Guide	Binary

4.4 Database Creation

N/A

4.5 Installation Scripts

N/A

4.6 Cron Scripts

N/A

4.7 Access Requirements and Skills Needed for the Installation

Installation of OR*3.0*455 requires the following to install:

- Programmer access to VistA instance and ability to install KIDS build.
- Citrix Access Gateway (CAG) installs – access/ability to upload to the CAG.
- Network Share installs – access/ability to upload executable to the network share location.
- Individual work-station installs – access/ability to push executable to required work stations.

4.8 Installation Procedure

4.8.1 OR*3*455 KIDS Installation

This patch should be loaded during non-peak hours to minimize disruption to users. Installation will take less than 5 minutes. For the installation, it is recommended that Group Notes users are off the system.

1. From the Kernel Installation and Distribution System Menu, select the Installation Menu.
2. Choose the Load a Distribution option. When prompted for the Enter a Host File, enter the location and filename OR_30_455.KID.
3. From the Kernel Installation and Distribution System Menu, select the Installation Menu. From this menu, you may elect to use the following options. When prompted for the INSTALL NAME enter the patch OR*3.0*455:
 - a. Backup a Transport Global - This option will create a backup message of any routines exported with this patch. It will not backup any other changes such as DDs or templates.
 - b. Compare Transport Global to Current System - this option will (allow you to view all changes that will be made when this patch is installed. It compares all components of this patch (routines, DDs, templates, etc.).
 - c. Verify Checksums in Transport Global - This option will allow you to ensure the integrity of the routines that are in the transport global.

From the Installation Menu, select the Install Package(s) option and choose the patch to install.

4. If prompted 'Want KIDS to Rebuild Menu Trees Upon Completion of Install? NO//', respond NO.

5. When prompted 'Want KIDS to INHIBIT LOGONs during the install? NO//', respond NO.
6. When prompted 'Want to DISABLE Scheduled Options, Menu Options, and Protocols? NO//', respond NO.
7. If prompted 'Delay Install (Minutes): (0 - 60): 0//' respond 0.

4.8.2 Group Notes GUI Installation

All installation methods will use the OR_30_455.ZIP file that contains the Group Notes GUI executable and the Group Notes help files (CPRSGN.CHM, RoboEx32.dll).

Generally, a small group of individuals at a site use Group Notes, which may dictate how you install Group Notes GUI executable.

4.8.2.1 Group Notes Executable Methods of Installation

- **Local Installation of GroupNotes.exe**

Download the ZIP file and extract all the files in one folder. (GroupNotes.exe and the CPRSGN.CHM Help files should be in the same directory on workstations.)

The default for the Group Notes executable location is: “C:\Program Files (x86)\VistA\GroupNotes”

- **Network (shared) installation:**

This method is typically the simplest to maintain, providing the local network infrastructure is robust enough to handle the additional traffic caused by users running the GUI executable (GroupNotes.exe) across the LAN.

The GUI executable (GroupNotes.exe), and ancillary files (DLLs, Help files etc.), are copied to a network shared location. Users are then provided with a desktop shortcut. The necessary command line parameters (VistA server address or name and RPC Broker Port number) are entered in the “Target” field of the shortcut properties

At the time of a Group Notes version update, the copy of GroupNotes.exe (and any updated ancillary files) is simply replaced, on the network share, with the new version.

Any users requiring access to another site's Group Notes system can be given an alternate desktop shortcut.

If a user requires access to an older or newer version of Group Notes (e.g. during a phased deployment, when sites are temporarily not all on the same version, or for testing purposes) a different version of GroupNotes.exe can be placed in a separate network location and the user be supplied with an appropriate alternate shortcut.

Note: The version of GroupNotes.exe a user executes must always match the patch-level version of the target VistA system.

- **Citrix installation:**

The GUI executable (GroupNotes.exe) and ancillary files (DLLs, Help files etc.) are installed and run from a remote workstation, and the user views the remote workstation's screen on their local workstation.

For the local site users, this method is on a similar level to the Network (shared) installation above. The users' workstations require only an appropriate shortcut (and the necessary Citrix Access Group (CAG) infrastructure).

Note: For issues with CAG, please contact your local or national help desk.

For the Citrix Farm administrator, this method involves installations on the host in a similar manner to either the Gold Path or the Direct Access methods outlined below.

4.9 Help File Installation

The Help file should be in the same directory as the GroupNotes.exe file to function correctly.

4.10 Installation Verification Procedure

Launch the Group Notes GUI and verify the splash screen now announces that you are running version 1.0.455

4.11 System Configuration

N/A

4.12 Database Tuning

N/A

5 Back-Out Procedure

5.1 Back-Out Strategy

To revert Group Notes to the previous version, site or ITOPS personnel would have to:

1. Replace the Group Notes executable, wherever it was installed, and help files with the previous versions.
2. Edit the OPTION file (#19) to restore previous value of the "OR GN SET LOCATIONS" option.
3. To manually restore the option, modify the MENU TEXT field (#1):
4. "1.0.455" to "1.0.448.8"

For example, change:

```
Group Notes Locations version 1.0.455 to  
Group Notes Locations version 1.0.448.
```

5.2 Back-Out Considerations

5.2.1 Load Testing

No load testing was performed on patch OR*3.0*455 and the Group Notes GUI because it has only minimal changes.

5.2.2 User Acceptance Testing

User acceptance testing was conducted by the test sites listed in section 3.2.2.

The sites followed the provided test plan and executed the test cases according to the plan for the first build of OR*3*455. The tests were performed by Clinical Application Coordinators at each site who are familiar using the Group Notes application. The sites either passed or failed any item based on testing. Any items that failed were re-developed and then sent back to the sites for the next build and further acceptance testing following the same process. The test cases were then delivered with concurrence by the sites to the Group Notes development team. Once in production, the final test cases from the last build were tested in production. No subsequent builds were created as the test cases passed and sites signed off on concurrence for release of the product.

5.3 Back-Out Criteria

Back-out would only be considered if there was a catastrophic failure that causes loss of function for the Group Notes application or a significant patient safety issue.

5.4 Back-Out Risks

With the Group Notes application, the risk for the back-out procedure is minimal. The previous GUI would be re-distributed and the VistA menu option updated to the previous version.

5.5 Authority for Back-Out

The site leadership has the final authority to require the rollback and accept the associated risks.

5.6 Back-Out Procedure

These steps assume that the only reason to consider a back-out for patch OR*3.0*455 and the associated GUI executable is in the event of a catastrophic failure.

1. Contact the CPRS Group Notes implementation team to notify them there has been a catastrophic failure with Group Notes. Use the mail group: OIT PD CPRS Implementation Team. If the decision is made to proceed with back-out and rollback, the sites will need to uninstall the OR*3.0*455 patch and redistribute the previous Group Notes executable.
 - a. Coordinate with the appropriate IT support, local and ITOPS, to schedule the time to edit the option and to push out / install the previous GUI executable and help files.
 - b. Site or ITOPS personnel need to edit the OPTION file (#19) for OR GN SET LOCATIONS and modify the MENU TEXT field (#1) to change 455 to 448.8.
 - c. Redistribute the previous executable and the previous help files.
2. Once the OR*3.0*455 patch has been uninstalled and the previous Group Notes executable and previous help files have been redistributed, verify operations before making available to the necessary staff.

5.7 Back-out Verification Procedure

1. Verify that “MENU TEXT” field of the option should be restored to the value of the GUI version to “1.0.448.8”
2. Ensure the previous Group Notes executable launches properly
3. Perform regression testing to verify that login with the username and password works
4. Perform site-specific testing appropriate to the areas where the catastrophic failure was identified

6 Rollback Procedure

6.1 Rollback Considerations

There are no database changes specifically related to patch OR*3.0*455 and the Group Notes executable.

6.2 Rollback Criteria

N/A

6.3 Rollback Risks

N/A

6.4 Authority for Rollback

The Facility CIO has the final authority to require the rollback and accept the associated risks.

6.5 Rollback Procedure

N/A

6.6 Rollback Verification Procedure

N/A

7 Example Installation

N/A